

Peru Oil and Gas Report Q3 2016

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Abstracts

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BMI View: Production of crude and natural gas will grow over the next decade owing to strong project pipeline and continued government support. However, the country will produce below its potential owing to a history of strong environmental opposition and a highly competitive regional market, diminishing the attractiveness of the country's oil and gas sector amid the industry-wide downturn.

Key developments in the Peruvian oil and gas sector:

Peru will remain among the region's brightest growth stories through 2017, as production growth in the mining sector and strengthening public investment lead accelerating economic activity. In recent quarters, growth has accelerated largely due to the beginning of production at Las Bambas, a massive copper mine set to rank among the world's three largest when it hits full production capacity later this year.

We expect the completion of the Southern Peruvian Pipeline (GSP) will be delayed to 2019 following the exit of its constructor, Odebrecht, the owner of a 55% stake in the project. The GSP - which is currently 34% completed - is expected to supply feedstock to two thermal power plants currently under construction in Ilo and Mollendo.

On May 6, Repsol and Petroperu agreed to increase fuel prices. Increases varied depending on the octane of the fuel, with prices at the pump rising from 2.6 to 4.7% in total.

Modernisation of Petroperu's 62,000b/d Talara refinery is progressing slightly

ahead of schedule, supporting our current downstream capacity forecast. As of May 4, the project was 37% completed. In the same month, the company issued a tender for underwater lines and multibuoys. Eight groups submitted consultations as of May 31, including Cadape, Cobra Instalaciones y Servicios, Cosapi, JJCSchrader Camargo, M y C Pariñas, Mota-Engil.

The full commissioning of the 4.5mntp Train 1 of the Sabine Pass LNG export facility in the US in May will threaten Peru's LNG market share. Though this will compete with Peru's exports, we believe the country will remain a dominant player in the region due to a lower variable cost of production compared to US supplies.

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